

Message Text

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PAGE 01 BERLIN 01325 021725Z

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ACTION EB-11

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SUB: CIVAIR: PANAM AND BERLIN CHARTER MARKET

REF: A) BONN 10249; B) STATE 143920; C) STATE 148542; D) BONN 10980

FOLLOWING DATA IS SUBMITTED AS BACKGROUND FOR DISCUSSIONS WITH PANAM REGARDING IMPACT ON MODERN AIR TRANSPORT (MAT) OF PANAM PLAN TO ENTER BERLIN/MEDITERRANEAN INCLUSIVE TOUR MARKET, AND ESPECIALLY QUESTION OF PANAM RESTRICTING ITS CHARTER OPERATIONS AT LEAST INITIALLY TO UTILIZATION OF ITS CURRENT EXCESS IGS CAPACITY:

A) PANAM NOW HAS ELEVEN AIRCRAFT ON IGS COMPARED WITH TWELVE LAST SUMMER. THIS DECREASE OF 8 PERCENT OF CAPACITY IS, HOWEVER, MORE THAN OFFSET BY SCHEDULE REDUCTIONS (NUMBER OF SEATS OFFERED BY PANAM DURING FIRST SIX MONTHS OF 1973 WAS 14 PERCENT BELOW FIGURE FOR SAME PERIOD IN 1972).

B) AT ALMOST ANY GIVEN TIME AT PRESENT, ONE OF ELEVEN PANAM AIRCRAFT IS ON STANDBY BASIS AND PRESUMABLY AVAILABLE FOR CHARTER USE.

C) PANAM OFTEN SCHEDULES CHARTER FLIGHTS FOR EVENING. THUS PERMITTING UTILIZATION OF ADDITIONAL AIRCRAFT AFTER LAST LIMITED OFFICIAL USE

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PAGE 02 BERLIN 01325 021725Z

REGULAR IGS FLIGHTS.

D) PANAM HAS BEEN RELATIVELY MORE ACTIVE IN BERLIN CHARTER FIELD THAN BEA, WITH 43 FLIGHTS IN 1970, 45 IN 1971, 64 IN 1972 AND 44 IN FIRST HALF OF 1973. BEA FLEW NO BERLIN CHARTERS IN 1970 OR 1971, 20 IN 1972 AND 12 IN FIRST HALF OF 1973.

E) PASSENGER TOTALS FOR IGS CONTINUE TO DROP, HAVING DECREASED 20 PERCENT IN FIRST SIX MONTHS OF 1973 COMPARED TO FIRST HALF OF 1972 (WHICH IN TURN WAS 6 PERCENT BELOW SAME PERIOD IN 1971). PANAM'S SHARE OF MARKET DROPPED FROM 64.6 PERCENT TO 62.8 PERCENT AND ITS LOAD FACTOR FELL FROM 63 PERCENT TO 57 PERCENT (BEA'S FROM 52 PERCENT TO 47 PERCENT). PANAM REPORTS RELIMINARY JULY 1973

FIGURES SHOW DECREASES OF 30 PERCENT IN ITS PASSENGER TOTALS COMPARED TO JULY 1972 AND 25 PERCENT IN BEA'S, WHICH IT ATTRIBUTES IN PART TO UNCERTAINTIES CAUSED BY AIR CONTROLLERS' SLOWDOWN. (PASSENGER DECREASE FOR JULY 1972 COMPARED TO JULY 1971 WAS 13 PERCENT FOR PANAM AND 21 PERCENT FOR BEA.)

F) BERLIN NONSCHEDULED PASSENGER FIGURES, WHICH CONTINUED TO INCREASE LAST YEAR WHILE SCHEDULED PASSENGER TOTALS DROPPED, HAVE NOW ALSO BEGUN TO TAPER OFF, FALLING BY 1.4 PERCENT FOR JANUARY-JUNE 1973 COMPARED TO SAME PERIOD LAST YEAR. MAT'S SHARE OF THIS MARKET FOR FIRST HALF OF 1973 WAS 59 PERCENT COMPARED WITH 64 PERCENT FOR SAME PERIOD LAST YEAR. MAT IS RELATIVELY OPTIMISTIC ABOUT UPCOMING FALL AND WINTER SEASON, BASED IN PART ON CONSIDERABLY EXPANDED PROGRAM OF WEEK-END TOURS TO MAJOR EUROPEAN CITIES RECENTLY ANNOUNCED BY ITS PRINCIPAL CONTRACTOR, BERLINER FLUG RING. FLUG RING WILL ALSO USE SCHEDULED PANAM AND BEA IGS FLIGHTS TO MUNICH AND HAMBURG IN ITS EXPANDED PROGRAM.BORG

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